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ABSTRACT

To test a situational leadership model, this study sought to determine (1) whether, among a population of educational administrators in East Tennessee, individuals possessing high flexibility/high effectiveness leadership characteristics can be identified and (2) whether those leaders consciously apply Hersey and Blanchard's concept of maturity criteria in selecting subordinates for task assignment. Data gathered from 66 school-level administrators on central office supervisors measured levels of effectiveness and flexibility regarding situational decisions. Interviews with high scoring respondents ascertained application of the criteria. Analysis reveals these major findings: (1) individuals scoring high in effectiveness and flexibility categories can be identified; (2) older men were proportionately better represented than younger men in these categories but data for women did not show this trend; (3) while years of administrative experience compared to classroom experience of male respondents were nearly equal, women's classroom experience was more than twice that of administrative experience; (4) the major Hersey-Blanchard criteria of subordinates' goal-setting abilities were not identified as being a consideration for choosing a subordinate for specific tasks; and (5) dependability and personal chemistry were frequently used new criteria. A more representative sample is needed to confirm conclusions. Investigation should verify leaders' use of criteria and clarify the relative proportion of high flexibility/effectiveness males and females. Fifteen tables provide data results. (CJH)

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Situational Leadership: Conscious Criteria
Applied in Educational Leaders' Decisions

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Introduction

A preliminary problem area of this study was to conduct an investigation to determine whether, among a population of educational administrators, individuals could be identified who possess specified leadership characteristics. The primary problem was to determine if those identified leaders are consciously aware of employee maturity criteria when selecting employees for task assignments.

Recent studies in leadership have emphasized situational management decisions, based on various factors such as the nature of the task, interpersonal relationships, and the relative abilities and maturity of followers. The notion of the importance of followers' maturity--whether individuals or the group as a whole--has gained in popularity in both business and education. Modern managers have been asked to become cognizant of the task dimension and the human relations dimension in dealing with employees.

Initial studies of leadership began with trait theory--an attempt to define leadership by a study of characteristics of leaders (Longnecker & Pringle, 1984). The trait theories were largely abandoned, however, as

studies of leadership behavior became emphasized. Of special significance is the emphasis of current and recent past leadership studies on the two dimensions of task-orientation and relations-orientation on the leadership continuum.

The early studies at the University of Michigan identified two concepts called "employee orientation" and "production orientation," designations that parallel the task and relations dimensions (Katz, Macoby, & Morse, 1950). A few years later, members of Ohio State University developed the Leader Behavior Description Questionnaire (LBDQ) instrument in an attempt to describe how leaders perform their jobs. The Ohio State studies categorized leader behavior along the two dimensions of Initiating Structure (task) and Consideration (relations) (Stodgill & Coons, 1957). Significantly, these studies for the first time described leader behavior on two separate axes, rather than on a single continuum. The Ohio State studies found that task and relationship behavior were separate dimensions and not mutually exclusive.

Halpin (1959) studied school superintendents and further defined the task and relationship components. He suggested that task behavior consisted of the leader's delineating the relationship between himself and his followers, defining patterns of organization and communication, and establishing methods of procedures. Relationship behavior, on the other hand, referred to

friendship, trust, respect, and warmth in the relationships between leader and subordinate.

Blake and Mouton (1964) expanded the production (task) and concern for people (relationship) dimensions into a grid containing four quadrants. The horizontal axis represented task, while the vertical axis represented relationship. A high rating of "9" was possible either horizontally or vertically, and a low score of "1" was also possible in both. A "5,5" rating indicated a leader who was in the middle of the task/relationship dimensions.

The next series of studies kept the two dimensions of task and relationship, but added the idea that situational or contingency leadership was most effective (Fiedler, 1967; Reddin, 1967). Fiedler, for example, identified three important considerations as variables affecting whether task or relationship behavior was more appropriate for a given situation: leader-follower personal relations, task structure, and position power of the leader.

Hersey and Blanchard, whose maturity concept is the focus of this study, added to leadership studies when they introduced the idea that the maturity level of followers should be considered when determining the most appropriate style of leadership (1981, reprinted from 1974). They defined maturity as "the ability and willingness of people to take responsibility for directing their own behavior" (1982, p. 151) and listed basic criteria for determining high maturity: the ability to set high but attainable

goals, education and experience, ability, and willingness (p. 157).

Purpose

This study was based upon the concept that a leader's effectiveness in determining the relative balance of emphasis on the dimensions of task and relationship would be based upon maturity levels of followers. Therefore, the purpose of this study was twofold: (1) to see if it were possible to identify leaders in public education who possessed high flexibility/high effectiveness leadership characteristics set forth in the Leader Behavior Analysis instrument by Blanchard Training and Development (Appendix A for identifier), and (2) to determine if those identified leaders make a conscious application of Hersey and Blanchard's concept of maturity criteria.

A series of questions was posed by the authors to guide this exploratory work. Using the LBA-Self instrument, are there educational leaders who, in fact, meet flexibility criteria of the instrument while they simultaneously demonstrate a strong level of effectiveness? Do leaders meeting the instrument's effectiveness and flexibility definitions also use Hersey/Blanchard maturity-level criteria in decisions regarding subordinates? Do these high flexibility/high effectiveness individuals assign responsibilities based on conscious application of the maturity-level criteria? Are there any obvious demographic characteristics associated with leaders who demonstrate both

flexibility and effectiveness?

Methodology

This study gathered and analyzed information concerning educational leaders and their situational decision-making skills. Initially, sixty-six school-level administrators or central office supervisors in upper East Tennessee were assessed concerning their situational decision-making skills. .

The LBA-Self, a commercially marketed instrument with established Alpha coefficients for reliability, was administered to the population. The instrument measures perceived leadership style, emphasizing levels of effectiveness and flexibility of respondents to various situations.

The procedure used to generate the sample of primary concern to this study began with an administration of the LBA-Self by fourteen research assistants who were trained in the use of the instrument, instructed in assessment of the leaders' pool, and trained in the final interview techniques. Established cut-off points were set for both effectiveness and flexibility levels, and the investigators conducted personal interviews on respondents measuring in the top third of scores. Those individuals were interviewed to ascertain the presence of conscious application of the maturity level criteria they employ in selecting subordinates for task assignment.

An interview guide was designed to place leaders in

three situations in which they had to choose a subordinate to complete a specific task (Figure 1). The responses to the situations allowed the interviewer to probe for specific maturity criteria used by the leader in making the choices.

Of the population of 66, twenty-one were identified whose scores met established cut-off points. (Twenty-four additional leaders made the cut-off with sufficiently high effectiveness scores but did not meet the flexibility criteria.)

Figure 1
Interview Guide Administered to
Identified High Effective/High Flexibility Respondents

-
1. Identify someone in your own mind to whom you would turn to complete a critical report assigned to you by your superior.
 - a. Why did you choose this person?
 - b. Was there any one (or more) factor(s) that makes the real difference in whom you chose?
 2. Think about a project that's important to you personally. Identify someone to whom you would turn to complete the assignment.
 - a. Why did you choose this person?
 - b. Was there any one (or more) factor(s) that makes the real difference in whom you chose?
 3. Think about a situation involving a project to be completed for your teachers. Identify someone to whom you would turn to complete the assignment.
 - a. Why did you choose this person?
 - b. Was there any one (or more) factor(s) that makes the real difference in whom you chose?
-

Findings

There were three major areas of findings that resulted from the analysis. First, it was possible to identify, from a sample of administrators and supervisors, individuals scoring in both high effectiveness and high flexibility

categories. Approximately one-third of all respondents scored above the determined cut-off points, thus qualifying to be in the high performance ranges established for this study (Table 1).

Table 1
Instrument Results by Main Categories
(N=66)

Sex	High Flex./ High Effec.	High Effec. Only	All Others
Male	14	19	18
Female	7	5	3

A report of demographic characteristics revealed information ancillary to the main purpose of the study. In terms of age, older men were proportionately better represented than younger men in the high flexibility/high effectiveness categories; the data for the female respondents do not show the same trend. Table 2 illustrates the age/sex comparisons of all respondents, while Table 3 shows age/sex comparisons for the high flexibility/high effectiveness respondents.

Table 2
Comparison of Age and Sex of All Respondents
(N=66)

Sex	Age of Respondents				
	30- Under	31-40	41-50	51-60	61- Over
Male	2	19	16	12	2
Female	2	5	3	4	0

In addition, Table 3 shows that 29 percent of the males

(14 of 51) scored in the high flexibility/high effectiveness categories, compared to 50 percent (seven of fourteen) of the female respondents.

Table 3
Comparison of Age and Sex of
High Effectiveness/High Flexibility Respondents
(N=21)

Sex	Age of Respondents				
	30- Under	31-40	41-50	51-60	61- Over
Male	0	4	4	5	1
Female	1	3	1	2	0

Another point evident from the respondents' demographic data was that, while the years of administrative experience compared to classroom experience of the male respondents were nearly equal, classroom experience of the females was two and one-half times that of their administrative experience (Table 4).

Table 4
Comparison of Total Years Classroom Experience and
Total Years in Administration
(N=66)

Sex	Total Years Classroom Experience	Total Years Administrative Experience
Male	566	556
Female	226	89

The primary question of the study was whether, in decision-making processes, respondents with high flexibility/high effectiveness scores consciously applied Hersey and Blanchard criteria in terms of maturity of

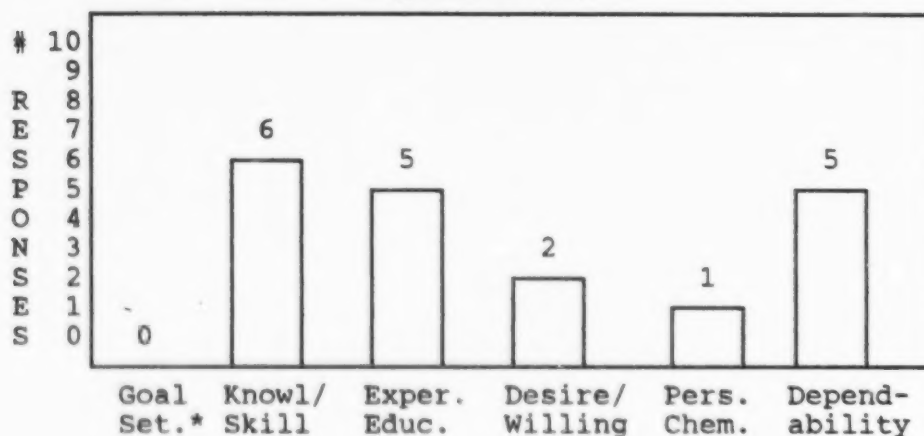
followers. (As stated earlier, Hersey and Blanchard (1982) identified basic components of maturity--all of which are to be considered in relation to a specific task to be performed: the ability to set high but attainable goals, willingness and ability to take responsibility, and education and/or experience.)

Indeed, Hersey-Blanchard criteria were identified in many of the interviews as respondents chose subordinates for specific tasks. However, one of their major criteria was not articulated by any respondent, while what appear to be two new criteria were identified.

Subordinates' goal setting abilities were not identified as being a consideration by any of the respondents. The two other factors were identified as often as--or more often than--the criteria listed by Hersey and Blanchard were dependability and personal chemistry, which were identified as being important considerations related to the situation being discussed.

For example, when completing a task for one's superior, the category of dependability was an important consideration in subordinates (Table 5). Personal chemistry, on the other hand, was an important consideration when the task to be completed was for the respondent personally (Table 6) or for teachers (Table 7).

Table 5
Responses to "Factors in Choosing
for the Superior"
(Question 1)



*(Goal Setting; Knowledge/Skills; Experience/Education; Desire/Willingness; Personal Chemistry; Dependability)

Table 6
Responses to "Factors in Choosing
for the Respondent" (Personal)
(Question 2)

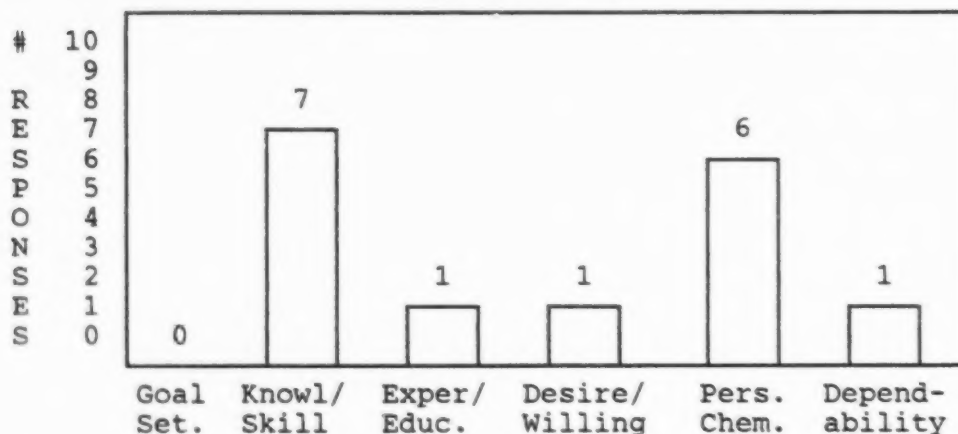
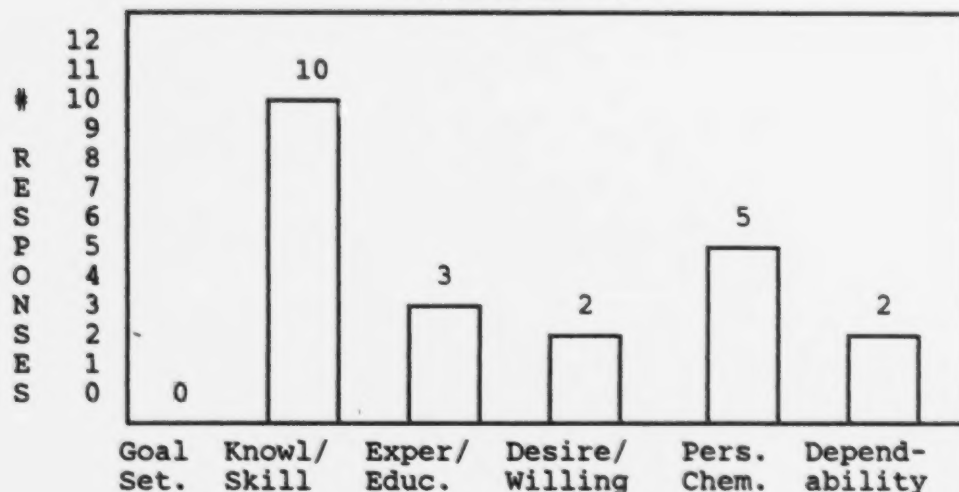


Table 7
Responses to "Factors in Choosing
for Other Teachers"
(Question 3)



The conclusions reached in this paper are understood to be limited to the population of the study. However, even the preliminary nature of this study demonstrates the need for additional, carefully controlled, systematic investigations--both to verify the demographics of this study (Appendix B) from a known, more representative population and to pursue a number of other issues: (1) conducting observations--or some other methodologies beyond self-reporting--to verify that the leaders are, in fact, using the criteria identified in the study; (2) making a comparison of interviews of the top one-third and bottom one-third of respondents to determine if distinctions are evident, related to the use of maturity criteria in decision making; (3) obtaining a truer picture of the relative proportion of males and females in the high flexibility/high effectiveness range.

The contribution of this work is best described in terms of future effort, not the past. Potential for impact on the decision- and leadership styles of educational leaders can be recognized in the type of questions that were raised, if not in the questions themselves. Preliminary data are encouraging enough to indicate that additional, large-scale, carefully controlled studies may reveal more detail concerning leader criteria in task selection for subordinates.

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Appendix A



Leader Behavior Analysis

Developed by Kenneth H. Blanchard, Ronald K. Hambleton, Drea Zigarmi and Douglas Forsyth

Self Perceptions of Leadership Style

Directions:

The purpose of the LBA-Self is to provide you with information about your perceptions of your own leadership style. The instrument consists of twenty typical job situations that involve a leader and one or more staff members. Following each situation are four possible actions that a leader may take. Assume that you are the leader involved in each of the twenty situations. In each of the situations you must choose one of the four leader decisions. **CIRCLE** the letter of the decision which you think would most closely describe **YOUR** behavior in the situation presented. Circle only one choice.

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16

(Form A)

Appendix B

Additional Demographic Data

Table 8
Comparison of Age and Years in Administration
of High Effectiveness/High Flexibility Male Respondents
(N=14)

	Years of Administrative Experience						
Age	0-5	6-10	11-15	16-20	21-25	26-30	31+
30 under							
31-40	1		2				
41-50	1	3			1		
51-60			1	3		1	
60+							1

Table 9
Comparison of Age and Years in Administration
of High Effectiveness/High Flexibility Female Respondents
(N=7)

	Years of Administrative Experience						
Age	0-5	6-10	11-15	16-20	21-25	26-30	31+
30 under	1						
31-40	1	2					
41-50		1					
51-60	1			1			
60+							

Table 10
Comparison of Age and Administrative Experience
of All Male Respondents
(N=51)

	Years of Administrative Experience						
Age	0-5	6-10	11-15	16-20	21-25	26-30	31+
30 under	2						
31-40	8	7	4				
41-50	2	6	4	3	1		
51-60		1	5	4	1	1	
60+			1				1

Table 11
Comparison of Age and Administrative Experience
of All Female Respondents
(N=15)

	Years of Administrative Experience						
Age	0-5	6-10	11-15	16-20	21-25	26-30	31+
30 under	2						
31-40	1	4					
41-50	2	1					
51-60	2	1	1	1			
60+							

Table 12
Comparison of Current Positions
of All Respondents
(N=66)

Sex	Elem. School	Middle/ Jr. High	High School	Central Office	Higher Ed.	Other
Male	15	6	16	10	3	1
Female	5	1	2	5	1	1

Table 13
Comparison of Current Positions
of High Effectiveness/High Flexibility Respondents
(N=21)

Sex	Elem. School	Middle/ Jr. High	High School	Central Office	Higher Ed.	Other
Male	4		6	4		
Female	2	2		1	1	1

Table 14
Comparison of Highest Degree Earned by
Male and Female Respondents
(N=66)

Sex	Highest Degree Earned			
	BS/BA	MS/MA	Ed.S	Ed.D
Male	2	43	4	2
Female	1	13	1	0

Table 15
Highest Degree Earned Among
High Effectiveness/High Flexibility Respondents
(N=21)

Sex	Highest Degree Earned			
	BS/BA	MS/MA	Ed.S	Ed.D
Male	0	12	1	1
Female	0	7	0	0